

Employees List

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Employees are individuals who work for your company and may or may not be a person who will be using Managely.

If the employee is also a Managely user, you can link the employee to the saved user to auto-fill several of the data entry fields. An employee record contains fields to track additional information that is not available on the user record.

Accessing employees from the Company Setup menu shows a list of all active employees. If an employee has been marked as a Technician or Salesperson (or both) on their employee record, the Yes/No button in the Technician and Salesperson columns indicate this.

From the Employee List, you can perform the following actions:

- Add new employees
- Edit or delete existing employees

Employees						
Image		Name	User	Email	Technician	Salesperson
		Goes Here, Your Name		youremail@xxxxx.com	<input type="radio"/> NO	<input type="radio"/> NO
		Toro, Bill	tech (Smith, John)	papayt@gmail.com	<input checked="" type="radio"/> YES	<input type="radio"/> NO
		Brown, Dan		travisp@alarmbiller.com	<input checked="" type="radio"/> YES	<input checked="" type="radio"/> YES
		Godby, Paul		noemail@onexcefile.net	<input type="radio"/> NO	<input type="radio"/> NO
		Silvia, Jacob		jacobs@perennialsoftware.c...	<input checked="" type="radio"/> YES	<input type="radio"/> NO
		Marks, Michael	Michael (Marks, Michael)	mkmarks@me.com	<input checked="" type="radio"/> YES	<input checked="" type="radio"/> YES
		Marks, Luke	Luke (Marks, Luke)	mkmarks@me.com	<input checked="" type="radio"/> YES	<input checked="" type="radio"/> YES
		DeBaggis, Justin		justin.debaggis@boldgroup...	<input checked="" type="radio"/> YES	<input checked="" type="radio"/> YES
		McConnell, Robert	Debbie (Marks, Debbie)	RobertM@perennialsoftwar...	<input checked="" type="radio"/> YES	<input type="radio"/> NO
		Salesperson, Unassigned		xyz@xyz.com	<input checked="" type="radio"/> YES	<input checked="" type="radio"/> YES
		Papay, Travis	bestsecurity (Papay, Travis)	papayt@gmail.com	<input checked="" type="radio"/> YES	<input checked="" type="radio"/> YES
		Unassigned, Salesperson,		noreply@alarmbiller.com	<input type="radio"/> NO	<input checked="" type="radio"/> YES

Employees List Tools

There are several tools available to manage the Employees List.

- Export to Excel
- Filter by active or inactive employees
- Open the menu (to the right of the column name) to hide/ show columns, or filter

Export to Excel

If you are viewing a list of all active or inactive records, clicking the Export to Excel button creates an Excel file with a

listing of the records currently shown in the grid. In a few seconds, the export file will appear on the taskbar. Double-click on the file to open.

The screenshot shows the 'Employees' list in the Bold Group software. The interface includes a left sidebar with various menu items like Home, Customers, Invoices, Payments, RMR, Work Orders, Proposals, Calendar, GL, Reports, and Setup. The 'Setup' menu is currently selected. The main area displays a grid of employee records with columns for Image, Name, User, Email, Technician (with a toggle switch), Salesperson (with a toggle switch), and actions (Edit, Delete, 0 Docs). A green arrow points from the 'Export to Excel' button in the header to the taskbar at the bottom, where a file named 'employees.xlsx' is listed. Another green arrow points from the 'Collapse' button on the left to the same taskbar entry.

Filter by Active or Inactive

At the upper right of the list is a toggle button used to show active-only or Inactive-only records.

The screenshot shows the 'Employees' list with a green arrow pointing from the 'Show inactive employees' toggle button to the button itself. The interface is identical to the previous screenshot, showing a grid of employee records with columns for Image, Name, User, Email, Technician (with a toggle switch), Salesperson (with a toggle switch), and actions (Edit, Delete, 0 Docs). The 'Show inactive employees' button is highlighted with a green circle and an arrow pointing to it.

Column Options

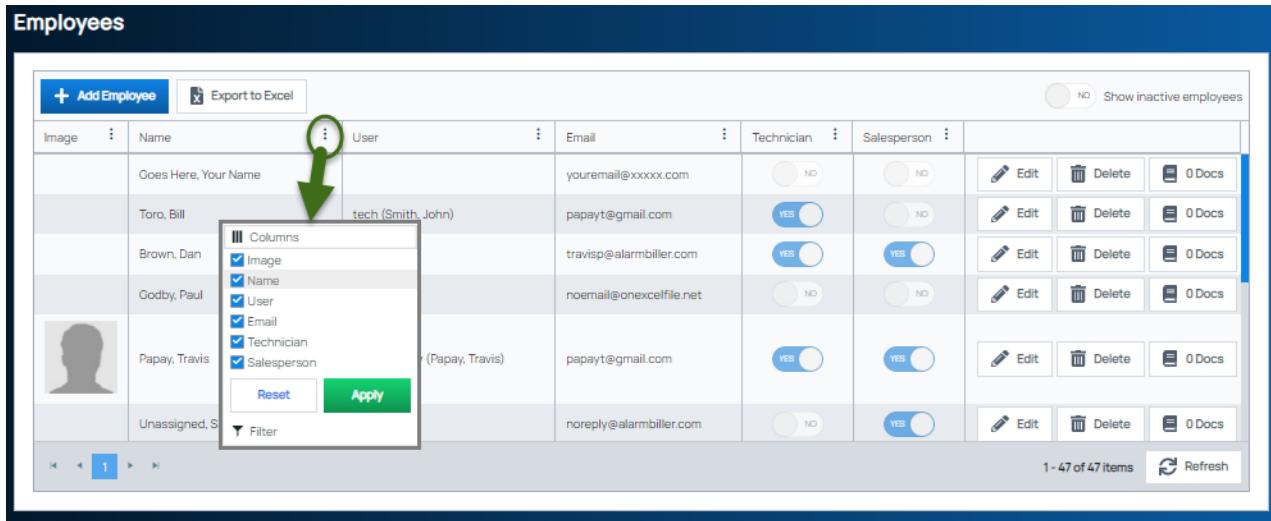
Clicking the kabob menu (three vertical dots) to the right of any column header displays a list of options:

The screenshot shows a kabob menu with the following options: Sort Ascending, Sort Descending, Columns, and Filter. The 'Columns' option is currently selected, indicated by a dropdown arrow.

Columns

When selecting this option, a list of all available columns is displayed. If you do not want certain columns displayed in the grid, clear the checkbox to the left of each field. Click the **Apply** button when finished.

Note: If you leave this page and return again, the columns will revert to the default view.



The screenshot shows a grid of employee data with columns for Image, Name, User, Email, Technician, Salesperson, and various edit/delete/doc actions. A green arrow points to a 'Columns' filter dialog box that is overlaid on the grid. The dialog box contains a list of columns with checkboxes: 'Image' (checked), 'Name' (checked), 'User' (checked), 'Email' (checked), 'Technician' (checked), and 'Salesperson' (checked). Below the list are 'Reset' and 'Apply' buttons, and a 'Filter' link.

Filter

Use this option to refine the list displayed in the grid. When clicking on Filter, a dialog box is displayed for entering criteria to find the records you want to display. The first field contains a drop-down list from which to select an operator. The list of available operators are:

- Is equal to
- Is not equal to
- Contains
- Does not contain
- Starts with
- Ends with
- Is null
- Is not null
- Is empty
- Is not empty

Select the desired operator, and then enter the criteria in the field below. Click Filter when finished. The list refreshes based on the filter criteria entered.

Note: If you leave this page and then return again, the columns will revert to the default view.

Employees

The screenshot shows a web-based application for managing employees. At the top, there are buttons for '+ Add Employee' and 'Export to Excel'. A 'Show inactive employees' checkbox is also present. The main area is a table with columns: Image, Name, User, Email, Technician (with radio buttons for NO and YES), Salesperson (with radio buttons for NO and YES), and actions (Edit, Delete, and a document icon). The table lists several employees, including 'Goes Here, Your Name', 'Toro, Bill', 'Brown, Dan', 'Godby, Paul', 'Papay, Travis', and 'Unassigned'. A green arrow points from the 'Filter' button in the table header to a dropdown menu in a modal dialog. The modal has sections for 'Columns' and 'Filter'. The 'Filter' section shows a search input with 'michael' and a dropdown menu with options like 'Contains', 'Is equal to', etc. The 'Contains' option is selected. The dropdown menu also includes 'Does not contain', 'Starts with', 'Ends with', 'Is null', 'Is not null', 'Is empty', and 'Is not empty'. The 'Filter' button in the dialog is highlighted with a green arrow.

Image	Name	User	Email	Technician	Salesperson	
	Goes Here, Your Name		youremail@xxxxx.com	<input type="radio"/> NO	<input type="radio"/> NO	Edit Delete 0 Docs
	Toro, Bill	tech (Smith, John)	papayt@gmail.com	<input checked="" type="radio"/> YES	<input type="radio"/> NO	Edit Delete 0 Docs
	Brown, Dan			<input type="radio"/> NO	<input checked="" type="radio"/> YES	Edit Delete 0 Docs
	Godby, Paul			<input type="radio"/> NO	<input checked="" type="radio"/> YES	Edit Delete 0 Docs
	Papay, Travis			<input type="radio"/> NO	<input checked="" type="radio"/> YES	Edit Delete 0 Docs
	Unassigned,			<input type="radio"/> NO	<input checked="" type="radio"/> YES	Edit Delete 0 Docs

1 - 47 of 47 Items [Refresh](#)